

1975

## H&S scene

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# SCENE

THE  
H&S

## THE LONG COUNT

During the 1974 annual audit of Dean Witter & Co., second largest of the Firm's brokerage clients, the San Francisco office found a way to make meaningful, challenging work out of a tedious chore—sorting 200,000 cards into good customer confirmations and customer exceptions.

The confirmations are IBM cards sent to each Dean Witter customer to ascertain whether his account balances are correct. The cards are considered good if they are returned signed and in acceptable shape (not folded, spindled or mutilated), while the exceptions are those cards that have a letter attached, are not signed or are otherwise unsuitable for processing by computer.

The San Francisco Dean Witter audit team, which numbers over thirty, included Dennis Wu, the manager in charge of the engagement; John Trewin who supervised the Operations Section of the audit; and Bob Archibald, Margot Fourie, Brent Thomas and Guy Woelk who worked on customers' confirmations. "We couldn't change the nature of the work," Guy said. "But by giving the work to those who would be challenged by it, our office achieved a trouble-free confirmations operation and a social good."

The people engaged to sort customer confirmations are employees of the

Disabled Employees' Rehabilitation Center, a unique San Francisco organization providing mentally disabled persons with an opportunity for meaningful work. All of the Center's employees, classified by the state as untrainable, have been denied rehabilitation services by public agencies. The Center is the lifework of Ming Chun, a man totally dedicated to helping the disabled, to giving them a chance to work and maintain their self-respect.

Because the Center is self-supporting, its success depends on the ability of Mr. Ming and his volunteer assistants to obtain enough work of the kind his employees can handle. This includes simple tasks like sorting, filling small bags with toys and packaging cocktail napkins. In search of new avenues for the Center's employees, Mrs. Mae Wu, a volunteer at the center and mother of manager Dennis Wu, asked her son if Haskins & Sells might be able to offer assistance.

"Processing customer confirmations has always been a staggering job on past brokerage audits because of the volume of cards and the tedious nature of the work," Dennis says. "We needed people who could sort the cards, putting the good ones aside and separating the mutilated ones from those with attach-

ments. I thought the employees of the Center, given adequate supervision, could successfully handle the job."

After some research into the Center, a tour of the plant and a look at the work being done there, Dennis decided to give the organization a try. He was encouraged by Robert Hall, Dean Witter's vice president in charge of Western Operations.

Work began in September with the typical slight misgivings that attend any new venture. These were quickly dispelled, however, by the dedication of the Center's employees. They worried constantly about the quality of their work, and were quick to turn to the supervising staff accountants for help whenever confronted by an unusual confirmation card. At the height of the "confirmation crunch," eight Center employees sorted nearly twenty thousand cards daily, and did it with very few mistakes. "That kind of performance is always noteworthy; from the mentally disabled it is truly remarkable," Guy Woelk says.

The members of the audit team agree that the experiment turned out well and, along with the San Francisco office and Dean Witter, congratulate the people of the Disabled Employees' Rehabilitation Center on a job well done. ○

